

Checklist for Training New Clerical Staff

Staff Name: _____ Start Date: _____ Position Title: _____

List All WIC Duties: _____

Overview

The following checklist indicates the required training for clerical staff. Per the Idaho WIC Program Policy Manual Ch. 8, any staff member that is cross-trained must ensure all applicable training is completed for those duties related to WIC. If Clerical staff performs job duties for other positions in WIC, then appropriate training checklist(s) should be completed. If additional pages are needed for training or observations please use the universal checklist pages and attach the position checklist for your records. These are the minimum requirements; staff are encouraged to continue training in various WIC areas related to their role as time allows.

Phase I: Basic Skills

It is recommended to complete the following training in the order provided and by the timeframe specified below, however the local agency may choose to train in a shorter timeline. Once completed, record the date and have your trainer initial next to the date confirming its completion.

Phase I is required training to be completed within the first 3 months. The hours listed below include the time it may take to complete the online course, guidebook and related activities. Not all topics have a guidebook and online course, see *type*. The QRC's identify how many total documents are within each section/folder in order to complete it. All LMS materials such as Guidebooks, Activities Workbook, QRCs and supplemental documents etc. can be found on the Idaho WIC website under the *training* section.

Type of Training Resource	Training Resource Title	Recommended Timeframe to Complete	Hours	Notes	Date Complete & Trainer Initials
Phase I: Basic Skills					
Guidebook	Overview	1 week	2	Complete prior to other courses	
Guidebook	Confidentiality	1 month	1-2	IWPPM Ch.1, Section C <i>Applicant Records</i> . Confidentiality Agreement. Guidebook mandatory, but exceptions may be	

				evaluated by the State on a case-by-case basis to use alternative training.	
PowerPoint	Civil Rights	1 month	1-2	Idaho WIC Civil Rights PowerPoint	
Policy Manual & Form	Employee Duty Restrictions	2 months	1-2	IWPPM Ch.2, Section D. & Conflict of interest form	
Online Course & Guidebook	Customer Service/Communication	2 months	3-6		
Guidebook	Issuing WIC Checks	2 months	2-4		
WISPr QRC	Add a Family/Participant (2 QRC's total)	3 months	N/A	Complete QRC's after Guidebooks and Courses (Complete as applicable to WISPr access/job duties)	
WISPr QRC	Check Printing/Voiding Checks (3 QRC's total)	3 months	N/A	Complete as applicable to WISPr access/job duties	
WISPr QRC	WISPr QRC scenarios (8 QRC's total)	3 months	N/A	Complete as applicable to WISPr access/job duties	

Phase II: Advanced Skills

Phase II includes advanced skills and will depend on the job duties (i.e issuing checks, collecting anthropometric data etc.), this training is required training to be completed within the first 6 months. Once completed, record the date and have your trainer initial next to the date confirming its completion.

Type of Training Resource	Training Resource	Recommended Timeframe to Complete	Hours	Notes	Date Complete & Trainer Initials
Phase II: Advanced Skills					
Overview Of Application Materials	Appointment card reminder, income tables/trigger card, <i>What To Bring To Your First WIC Appointment</i> handout	4-6 months	N/A	Staff should be able to answer basic questions regarding how to apply for WIC and what to bring to appointments.	

Guidebook	Referrals	4-6 months	2-3		
Online Course & Guidebook	Breastfeeding Nutrition	4-6 months	4-7		
Observation Of Experienced Staff	Observe at least two different WIC breastfeeding classes.	4-6 months	1		
Online Course & Guidebook	Basic Nutrition	4-6 months	4-6	Highly recommended, but not mandatory	
Phase II: Advanced Skills - Training Specific To Job Duties Tasks For WIC					

Observations

The following recommended timeframe outlines what competencies the **Training Lead** must observe to confirm skills from phase I or II are adequate.

Observation Checklist for New Clerical Staff				
Type of Observation	Competency	Recommended Timeframe to Observe	Date Observed	Training Lead Initials
Issuing benefits	Performing accurate check issuance/printing, check register documentation.	2 months		